



State Board of Equalization

News Release

Chairman Jerome E. Horton

4th District – Los Angeles

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Executive Director
www.boe.ca.gov

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Taxpayer Refund Rules Eased with Signing of BOE-Sponsored Legislation

Sacramento – The California State Board of Equalization (BOE) is pleased to announce that the Governor has signed BOE-sponsored legislation that will reduce the likelihood that taxpayers will miss the deadline for reimbursement of bank charges resulting from a BOE collection or processing error. The law becomes effective January 1, 2014.

“It’s a small step, but an important one,” said BOE Chairman Jerome E. Horton. “We have to work constantly to improve taxpayer compliance. The easier we make it, the easier to stay in bounds.”

[Senate Bill 442](#) is part of the Board’s ongoing commitment to improve our taxpayers’ experience through better, more efficient customer service.

Current law only allows the BOE to issue reimbursement of these charges if the tax or feepayer requests them within 90 days of the BOE error that caused the taxpayer to incur bank charges. The new law will allow the taxpayer 90 days after the bank charges are incurred, to file a reimbursement claim. The new law provides taxpayers more opportunity to see the charges on their bank statements, and not miss the deadline to file a reimbursement claim.

This new law will enable the BOE to fairly and equitably administer the law in the rare instances that the BOE makes an error in processing or collection.

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Elected in 2010, Chairman Jerome E. Horton is the Fourth District Member of the California State Board of Equalization, representing more than 8.5 million residents in Los Angeles County. He is also the Board of Equalization’s Legislative Committee Chairman. He is the first to serve on the Board of Equalization with over 21 years of experience at the BOE. Horton previously served as an Assembly Member of the California State Assembly from 2000-2006.

The five-member California State Board of Equalization is a publicly elected tax board. The Board of Equalization collects more than \$53.7 billion annually in taxes and fees supporting state and local government services. It hears business tax appeals, acts as the appellate body for franchise and personal income tax appeals, and serves a significant role in the assessment and administration of property taxes. For more information on other taxes and fees in California, visit www.taxes.ca.gov.

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